Enrich for HubSpot Integration Guide

For administrators setting up ZoomInfo Enrich integration with HubSpot

ZoomInfo Enrich is a feature available for ZoomInfo Sales. Enrich includes two applications for keeping your HubSpot database up to date with accurate B2B contact and company data.

- With **Instant Enrich**, your lead, contact and account records will be instantly appended with ZoomInfo data as they are created in your HubSpot environment.
- **Scheduled Enrich** provides scheduled jobs to keep your HubSpot records enriched on a regular cadence.

Get Connected

Automate enrichment for contacts and companies on a weekly, or nightly basis, and fill in missing data properties for improved lead scoring, segmentation, and sales follow-up. Spend less time digging and researching and more time selling using ZoomInfo data within your current HubSpot workflow.

Create Custom Properties in HubSpot

Let's get started by creating a few key custom properties in HubSpot to capture ZoomInfo data. These custom properties will be used to track enrichment usage, reporting and help troubleshoot any errors.

1. Log into your HubSpot environment as an admin.
2. Follow the steps detailed here to create custom fields for contacts and companies.
3. Create the following Contact properties (enter the exact text for the Label property):
    - **ZoomInfo Contact ID** (set the **Field Type** to **Single Line of Text**)
    - **ZoomInfo Company ID** (set the **Field Type** to **Single Line of Text**)
4. Create the following Company properties (enter the exact text for the Label property):
    - **ZoomInfo Company ID** (set the **Field Type** to **Single Line of Text**)

Custom Property Recommendations

ZoomInfo strongly recommends creating custom properties for all ZoomInfo fields you want to capture. By creating and storing all ZoomInfo data in custom properties, you do not risk losing any existing data. Additionally, tracking ZoomInfo data in separate custom properties allows you to understand exactly which properties were enriched by ZoomInfo.

Add the new ZoomInfo custom fields as default properties. Doing so will allow your users to see ZoomInfo data directly on a HubSpot contact or company record. Click here to learn how to display properties under the **About** section in a record.

Create a custom property group to help organize the custom properties associated with ZoomInfo fields. Follow these steps to create a custom property group. Name your custom property group ZoomInfo Properties.

Fields You Can Enrich

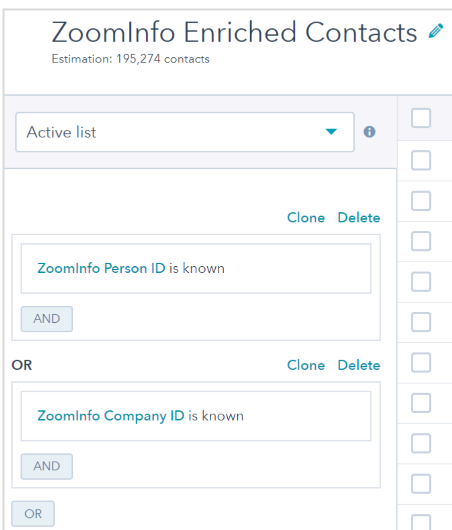
Download this [Excel spreadsheet] that shows all potential fields ZoomInfo can enrich in HubSpot and recommendations for creating these fields as properties in HubSpot.

Create an Active List

Creating an active list based on the ZoomInfo ID custom properties provides a means to track all contact records that have been enriched by ZoomInfo.

1. Follow the guide here to create a new Active List.
2. Name your new list *ZoomInfo Enriched Contacts*.
3. Select the following list criteria:
   - **ZoomInfo Contact ID is known**
   - **ZoomInfo Company ID is known**, making sure to group these criteria with an **OR** clause

   Your list should look like this:



4. Click **Save** to save your list.

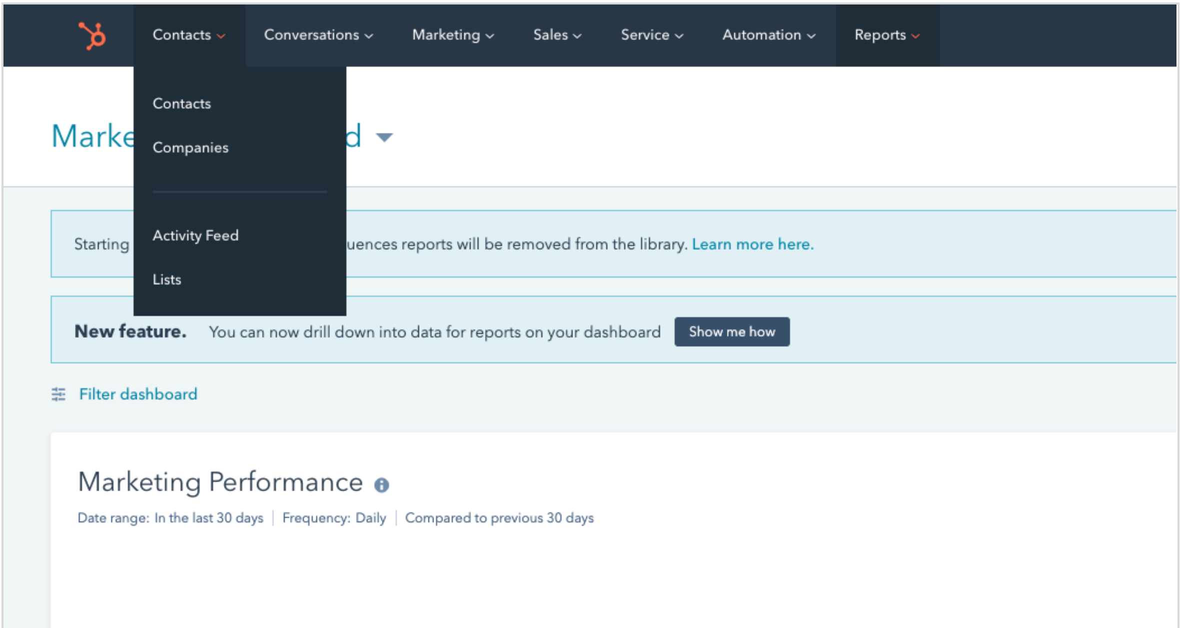
Scheduled Enrich

Keep your HubSpot database up to date with routine data enrichments. Data enrichment jobs allow you to select a frequency you would like to update your HubSpot database and custom mapping configuration to determine exactly how you want to capture and write ZoomInfo data.

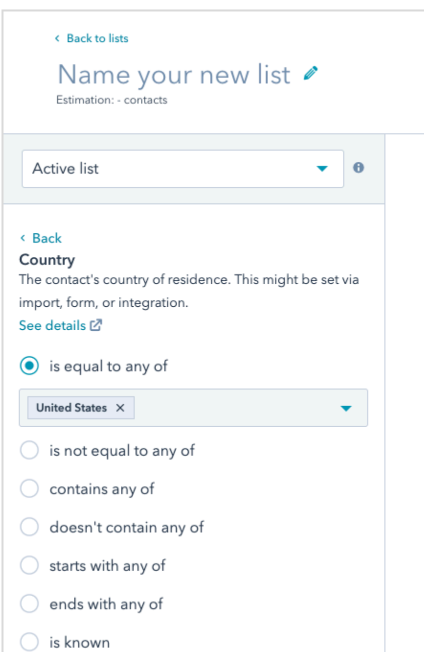
Create a HubSpot List of Contacts to Enrich

For enriching contacts, you can choose to enrich all contact records, or use a HubSpot list to determine which contacts in your HubSpot environment that you want to enrich.

1. Log in to your HubSpot account.
2. Click the **Contacts** tab, and select **Lists** in the drop-down.



3. Click **Create List** in the top right corner.
4. Name your new list at the top of the left hand panel and apply filters to segment which contacts you would like to Enrich. This list can be either **Static** or **Active**.

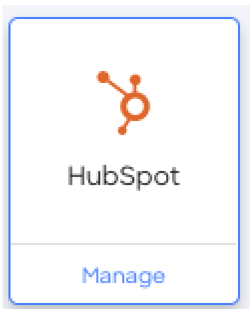


Note: We suggest editing the columns of the report to view the properties which ZoomInfo will be enriching.

Connect ZoomInfo to HubSpot

1. Go to **Admin Portal > Integrations > Connect Enrich**.
2. In the **Scheduled Enrich** section, click **Connect** under the HubSpot tile.

   A popup window displays.
3. Authenticate using the HubSpot user dedicated to running Enrich.
4. After successfully connecting, the HubSpot tile will display a **Manage** option. Click **Manage**.



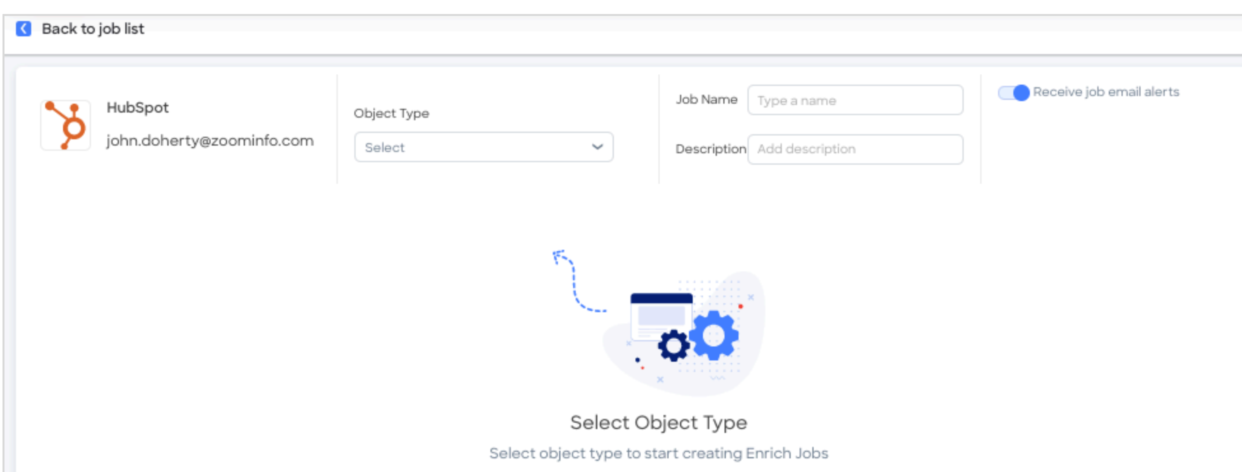
Note: The top of the page displays the email account used to connect to HubSpot. If this email is different from the currently connected admin user, a link will be enabled to change to current admin.

Add Scheduled Jobs

Add recurring scheduled jobs to keep your HubSpot data enriched. Within each job, you'll specify the frequency of enrichment, specify the static list to enrich, and configure the mapping of ZoomInfo data to HubSpot properties.

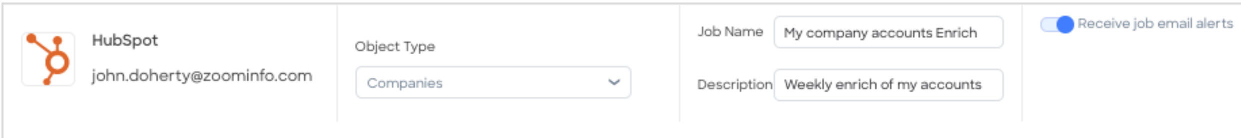
To add a scheduled job:

1. Click **Manage** under the Scheduled Enrich HubSpot tile.
2. Click **New Job**.



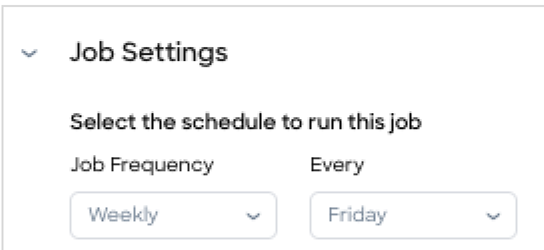
3. For **Object Type**, select either **Companies** or **Contacts** in the drop-down.

4. Provide a **Job Name** and **Description** and choose whether you want job email alerts.



Job Settings

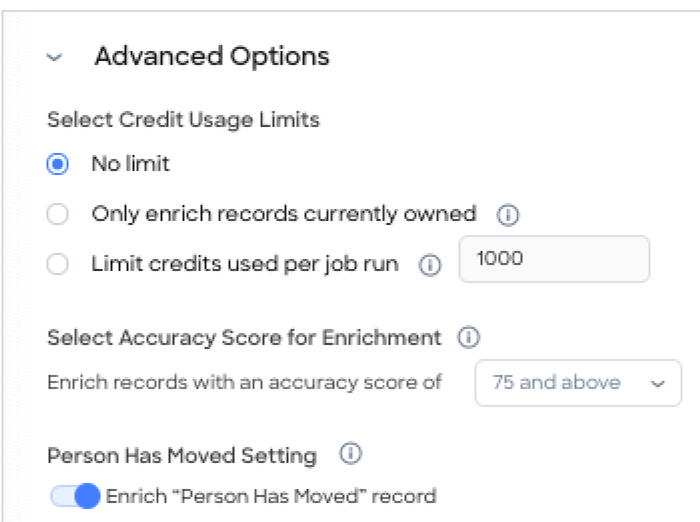
Configure the run frequency for your job.



Select the schedule to run this job: Configure the job frequency for recurring jobs. Jobs begin at 12:00 AM ET on the scheduled day.

Advanced Options

You can control credit usage when a job is run.



Select Credit Usage Limits

Select one of the following options:

- **No limit**: Default option. All records in the job run will be enriched and applicable credits will be charged.

- **Only Enrich records currently owned**: Enrich only the records that are currently under management. This option does not incur any credit charges.
- **Limit credits used per job run**: Limits the number of credits spent for each job run to the number specified. Once the specified number of credits is reached, processing is stopped. Remaining records will be enriched in the next job run.

Select Accuracy Score for Enrichment

You can control contact enrichment by Accuracy Score, ensuring you are only enriching contacts that meet your minimum business requirements.

Note the following:

- Matched records that are not enriched because they do not meet your minimum Accuracy Score will be marked as **No Match** with a **No Match Reason** of "Below selected Accuracy Score".
- If you've enabled the **Enrich ZoomInfo Custom Object** toggle (under **Mapping**), contacts that do not meet the minimum Accuracy Score are not exported to the custom object.

Person Has Moved Setting

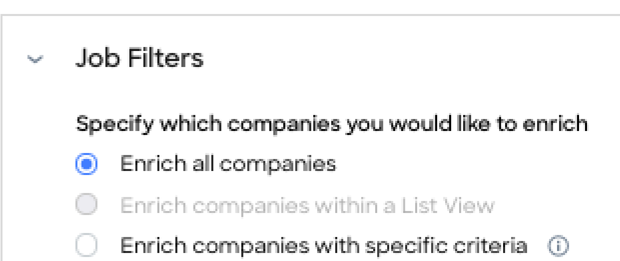
When ZoomInfo data indicates that a person has moved organizations, Scheduled Enrich jobs will do one of the following, depending on this setting:

- If **enabled** (default), the Person Has Moved record will be enriched to reflect the new organization. This is the existing default behavior that is automatically enabled in your Scheduled Enrich jobs unless you disable it.
- If **disabled**, the Person Has Moved record for Contacts and Leads will not be enriched.
    - ZoomInfo will continue to enrich the company fields as if the person has not moved
    - NeverBounce person details are enriched
    - The **Enrich Status** will change to **Company Match Only**

For details on mapping and other considerations for this setting, see Person Has Moved Field Mapping.

Job Filters

Choose the method to define the data set to enrich.

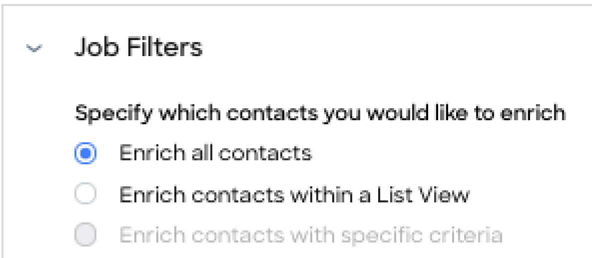


Filtering options depend on the object type you select.

Configure Filtering Options for Contacts

If you're creating a job for the Contacts object type, select one of the following options:

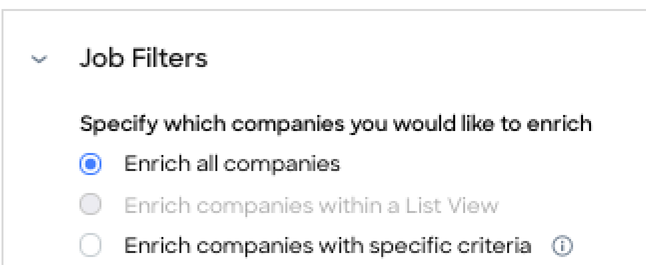
- **Enrich all contacts**: Queries all the records within the HubSpot object.
- **Enrich contacts within a List View**: Displays a dropdown menu of all available HubSpot lists that have enrichable records. Click View number of records to see the size of the selected list.



Configure Filtering Options for Companies

If you're creating a job for the Companies object type, select one of the following Filter Options:

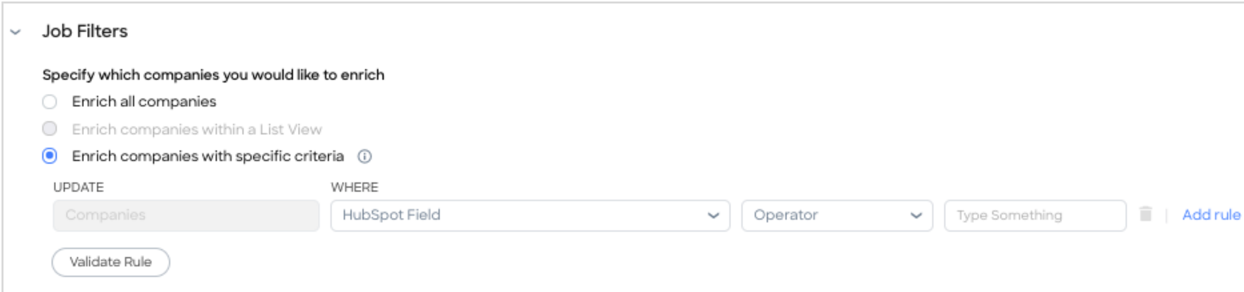
- **Enrich all companies**: Queries all the records within the HubSpot object.
- **Enrich companies with specific criteria**: Add field filter criteria to specify which objects you want to enrich. Each criteria row is joined with an AND operator.



When using specific criteria, add one or more rules using the dropdown menus provided.

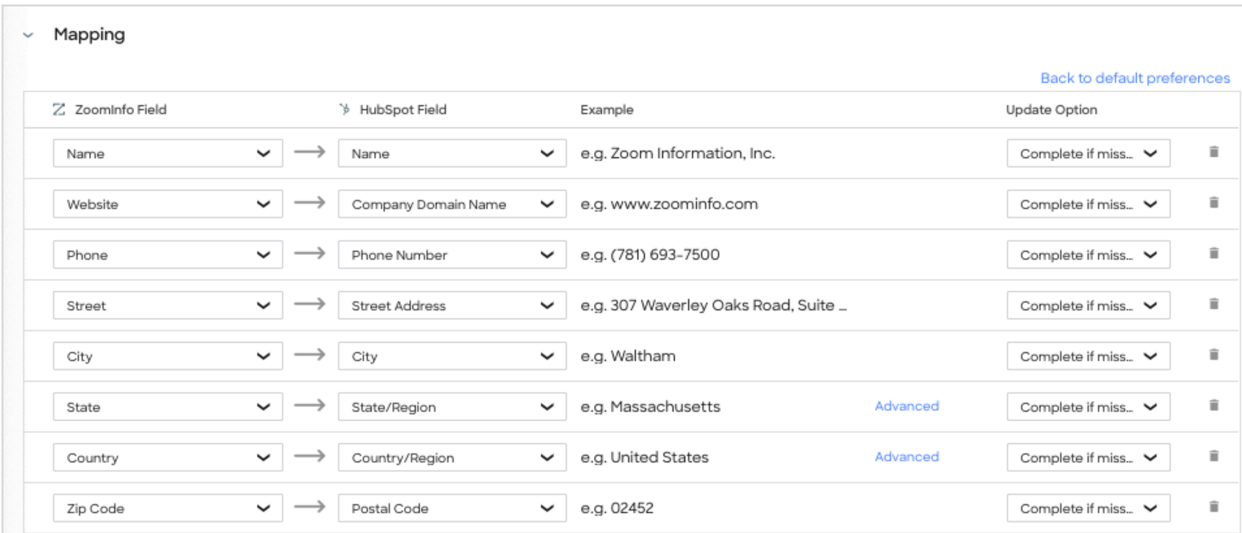
Important: When using the **Enrich companies with specific criteria** option, you can enrich up to 10,000 companies per job. To work around this limitation, you can create multiple rules that each apply to less than 10,000 records.

As you create each rule, click **Validate Rule** to ensure the rule is valid and see how many companies in HubSpot are impacted by the rule.



Mapping

Configure the field mapping of ZoomInfo to your integration and the update logic for each field.



ZoomInfo Field: Select the ZoomInfo data point you would like to return

HubSpot Field: Select the HubSpot field you would like to capture the specified data (supports custom fields, as well)

Update Option: Select whether you would like to overwrite existing data for complete if missing.

Important: ZoomInfo recommends the following:

- Work with your HubSpot administrator to understand field mapping and update options to ensure records are enriched as expected.
- Set all standard HubSpot fields to **Complete if missing** (this is the default state). Only select **Overwrite** for custom fields created specifically for ZoomInfo.
- **ZoomInfo Contact ID** and **ZoomInfo Company ID** are unique identifiers for ZoomInfo contact and company records. You should create and map custom fields to these fields.

Person Has Moved Field Mapping: If you've enabled the Person Has Moved setting, map the ZoomInfo **Person Has Moved** field to an existing or custom field in your CRM.

- Use a text field type to avoid any formatting issues. Field values displayed are:

- **Yes**: This person has left the company you had them profiled in
  - **No**: This person is still with their current company
  - **Uncertain**: ZoomInfo cannot verify if this person has left or not

- Set the **Update Option** field to **Overwrite** to be able to identify when a record changes after a job is run.
  - You can view the **Person Has Moved** column on the Enrich dashboard to see contacts where the **Person Has Moved** value is **Yes**.
  - You can run a report in your CRM that keys on the field to which you mapped the ZoomInfo **Person Has Moved** field, and where the field value is **Yes**.

- Enrich does not associate contacts with their new companies. It is up to your organization to evaluate these records and adjust associations.

- The majority of the effort to resolve company associates for contacts occurs on the first run of a Scheduled Enrich job. Subsequent runs typically pick up a small number of deltas when people change companies.

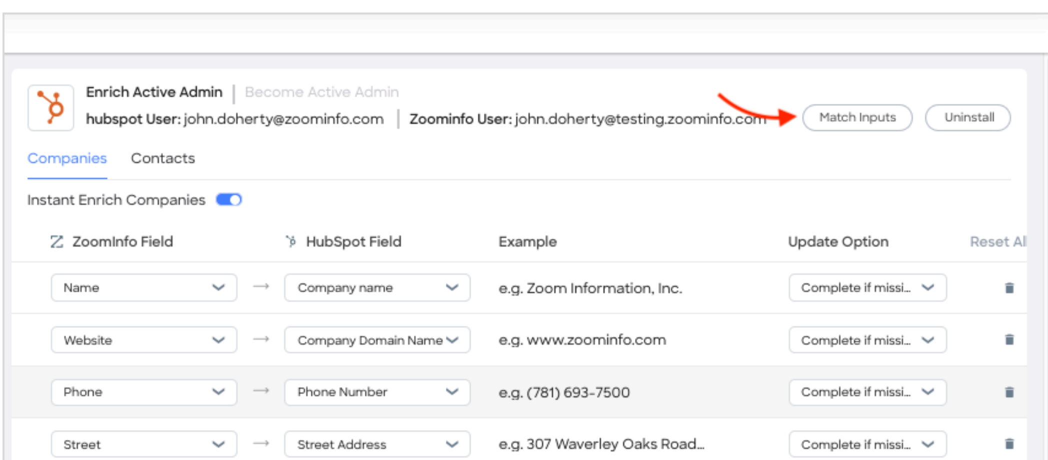
Customize Match Inputs

You can optionally include additional fields in your default match criteria using the **Customize Match Inputs** page.

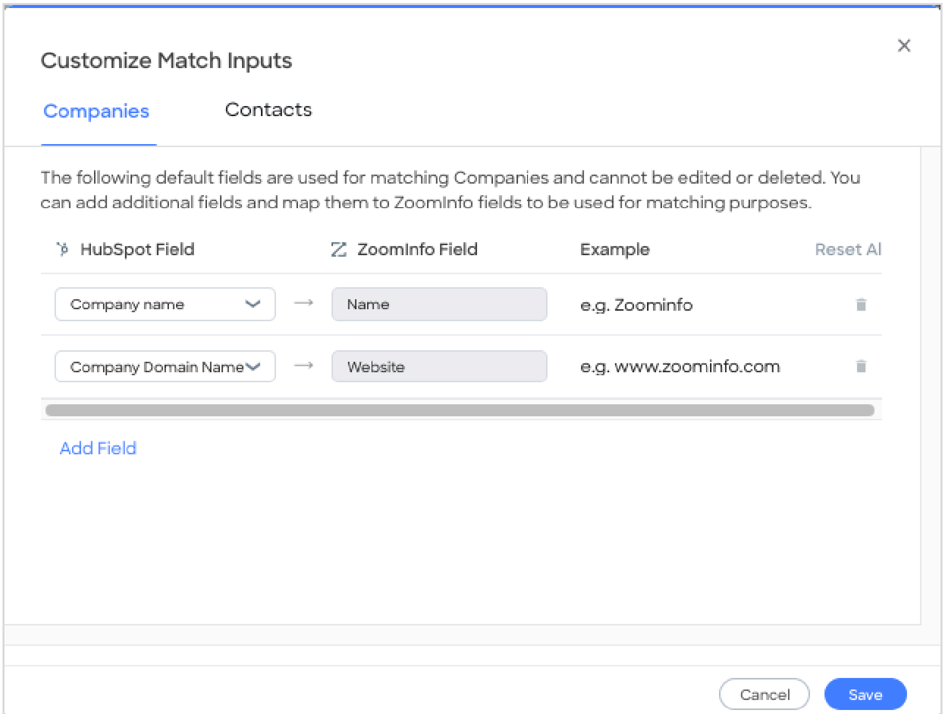
Each object type (e.g., Companies and Contacts) has a set of default fields that ZoomInfo uses to match in HubSpot. Although you cannot change the default ZoomInfo fields, you can include additional ZoomInfo fields on which to match - giving you more data accuracy control when enriching records in HubSpot.

To customize match inputs for your Enrich object types:

1. Click **Match Inputs** to view your current match inputs.



The **Customize Match Inputs** page includes a tab for each object type (e.g., **Companies** and **Contacts**).



2. Select the object type you want to customize. You cannot remove or edit the default match inputs, but you can include additional match inputs.

3. Click **Add Field** to select an additional field as a match input and map it to a corresponding field in HubSpot.

4. Click **Save**.

You can use the **Customize Match Inputs** page at any time to include additional match inputs or remove inputs that you've previously added. To return to the default match inputs, click **Reset All**.

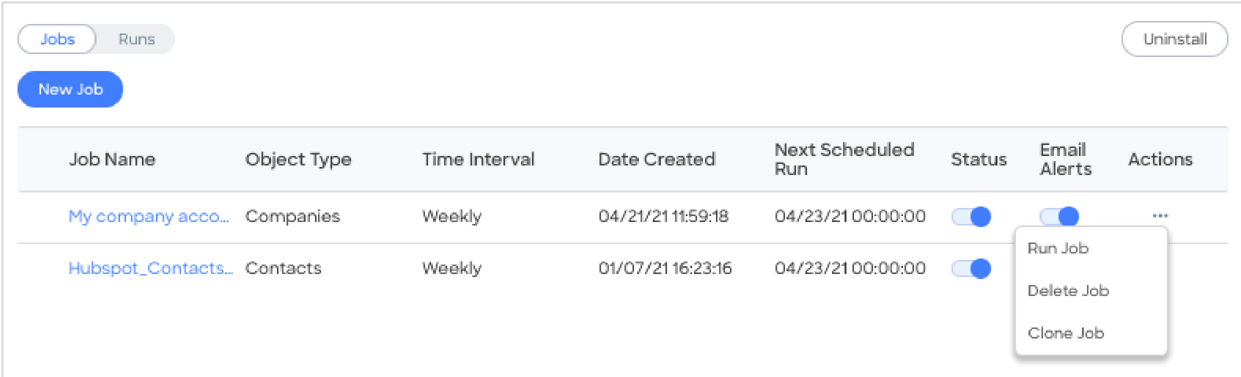
Verify and Save

Click **Verify and Save** to finish creating the job. Any errors with job configuration will display.

After your job is created successfully, you should see the new job listed in your Jobs table. You can enable or disable jobs by toggling the **Status** slider.

Manage Jobs

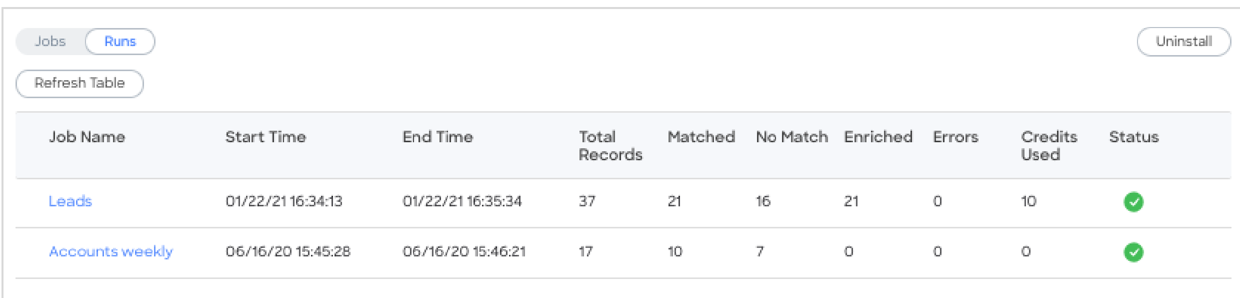
To run, clone, or delete a job, click the **Actions (...)** menu and select the desired action.



View Job Runs

Each run of your Enrich Jobs will appear in the **Runs** table. Runs are created as soon as a job is initiated. Check the **Runs** table to view the status of jobs currently in progress and a historical list of completed runs.

1. Click **Runs**.



2. Review the run information.

Manage the Connection

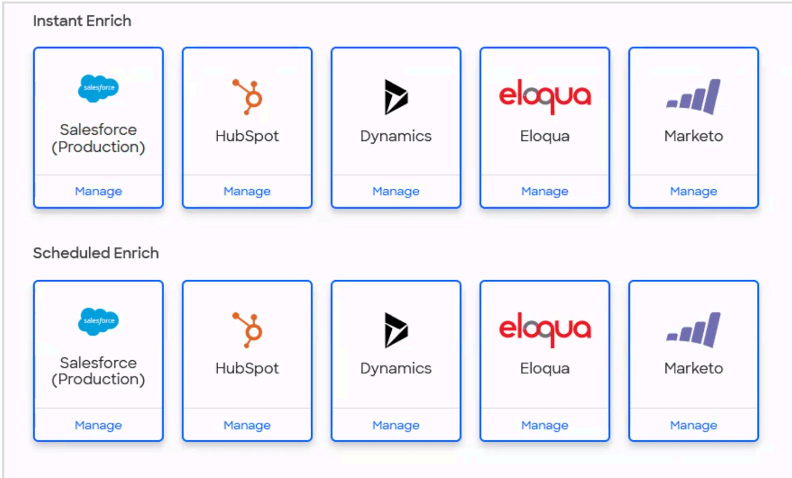
This section describes how you can manage the connection over time, including changing the Enrich Active Admin (for example, due to a departure or re-org), or disconnecting the Enrich integration.

Change Enrich Active Admin

Enrich administrators must have full administrative privileges in HubSpot. The Enrich administrator must also have an Admin Portal seat on the ZoomInfo platform.

To change the Active Admin for Enrich:

1. Ensure you are logged in to HubSpot as an admin with full privileges.
2. Login to ZoomInfo and select **Admin Portal** from the waffle menu.
3. On the left menu click **Integrations > Connect Enrich**. The **Connections** page displays.
4. Under **Scheduled Enrich**, find the tile for HubSpot and click **Manage**.



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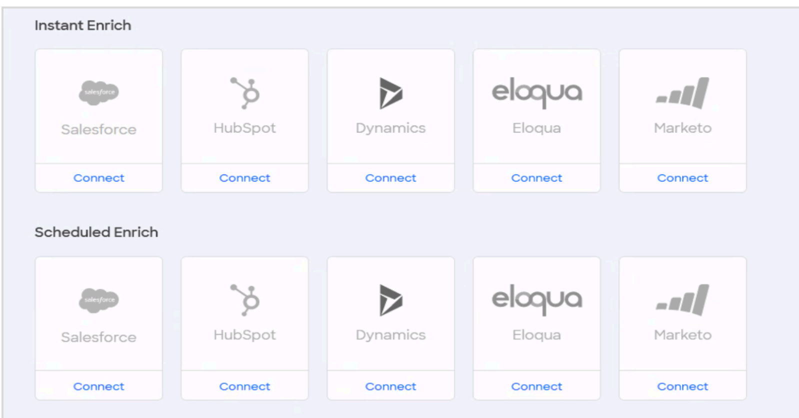
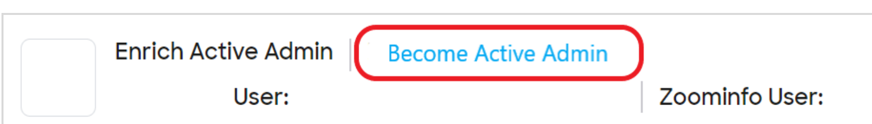


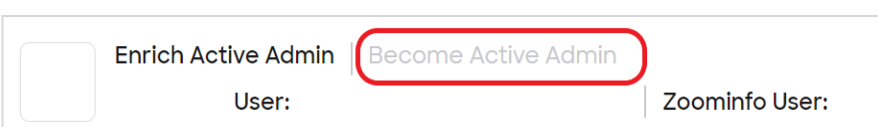
For additional information on how to connect Enrich for HubSpot see [Integration and Implementation Guides](#).

5. After clicking **Manage** you are taken to the **Jobs** page in Scheduled Enrich. At the top of the page you will see **Enrich Active Admin**.

6. If you are not the current Active Admin for Enrich the link will be blue. Click **Become Active Admin** and follow the prompts to become the Active Admin.



If **Become Active Admin** is gray it indicates that you are the current Enrich admin. Hover your mouse over **Become Active Admin** to confirm.



7. The HubSpot User shows the email address of the current HubSpot administrator connected to Enrich.
8. ZoomInfo User shows the ZoomInfo administrator logged into the ZoomInfo platform through the Admin Portal.

Disconnect ZoomInfo From HubSpot

If you want to disconnect ZoomInfo Enrich from HubSpot:

1. Disable any Enrich jobs using the **Status** toggle.
2. Click **Disconnect** in the top right of the page.
3. Uninstall the ZoomInfo app from your HubSpot account. See the *Uninstall an app* section in this [HubSpot Knowledge Base article] for how to uninstall the app and understand removing the app may affect users' HubSpot accounts and data.

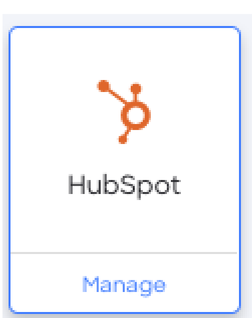
Instant Enrich

Receive immediate insights into contacts and companies as they are created in your HubSpot environment by enabling instant enrichment. You configure Instant Enrich for Contacts and Companies independently.

Connect ZoomInfo to HubSpot

1. Go to **Admin Portal > Integrations > Connect Enrich**.
2. In the **Instant Enrich** section, click **Connect** under the HubSpot tile.

   A popup window displays.
3. Authenticate using the HubSpot user dedicated to running Enrich.
4. Review the scope details and click **Connect app**.
5. After successfully connecting, the HubSpot tile will display a **Manage** option. Click **Manage**.



Note: The top of the page displays the email account used to connect to HubSpot. If this email is different from the currently connected admin user, a link will be enabled to change to current admin.

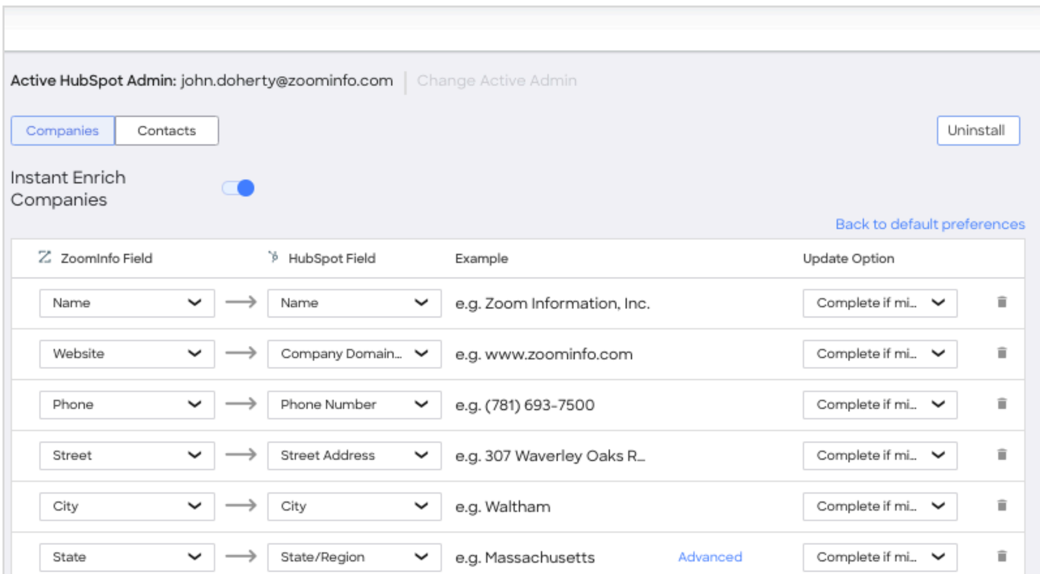
Configure Instant Enrich

1. Select the object type you want to enrich (**Companies** or **Contacts**).

   For **Contacts**, you can control contact enrichment by Accuracy Score, ensuring you are only enriching contacts that meet your minimum business requirements. Matched records that are not enriched because they do not meet your minimum Accuracy Score will be marked as **No Match** with a **No Match Reason** of "Below selected Accuracy Score".

2. Enable or disable enrichment by clicking the **Instant Enrich <object_type>** toggle.

3. Configure mapping to determine how ZoomInfo data will be captured.



   ZoomInfo Field: Select the ZoomInfo data point you would like to return

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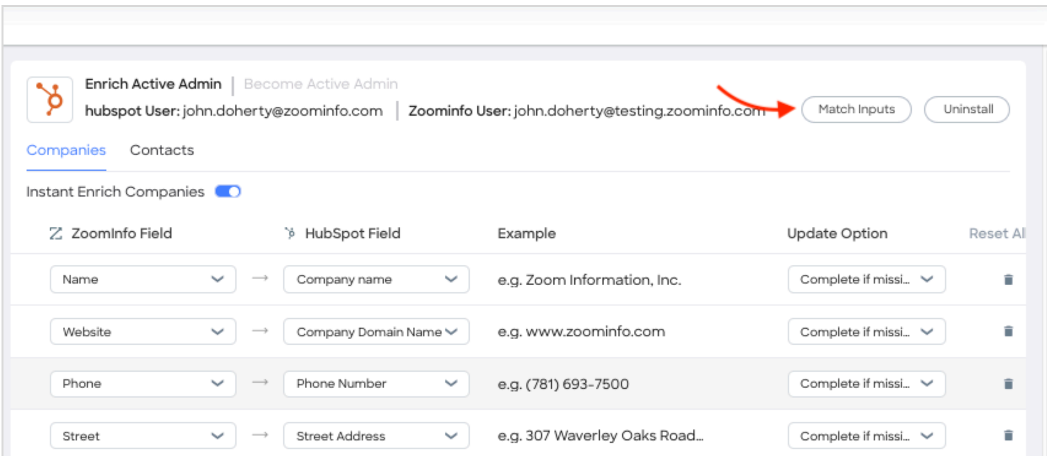

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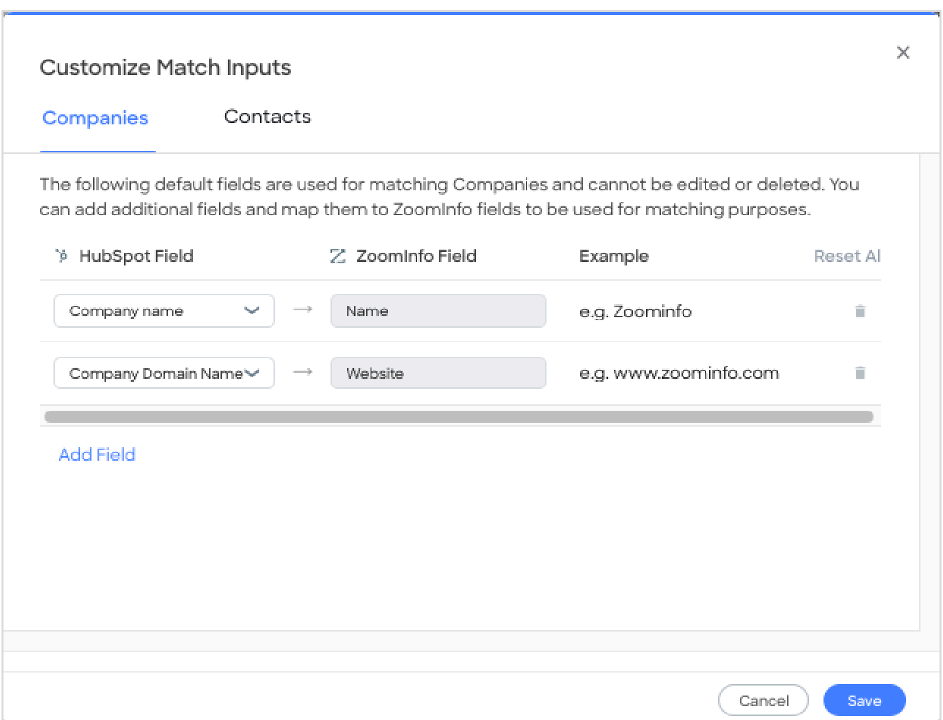

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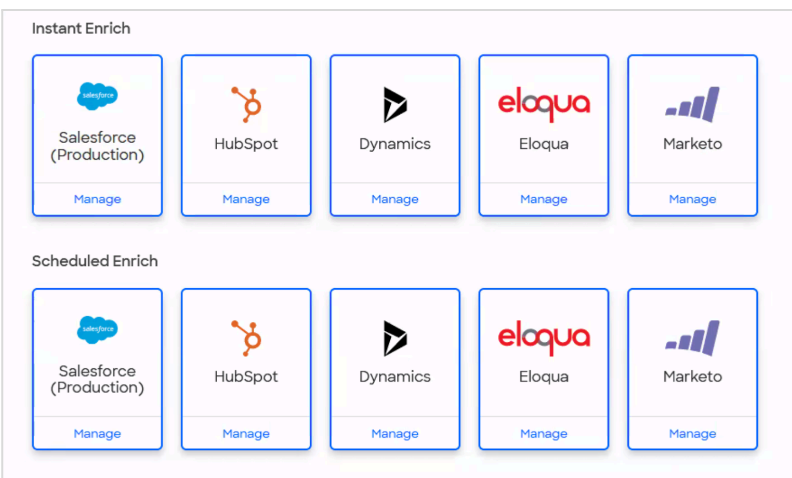

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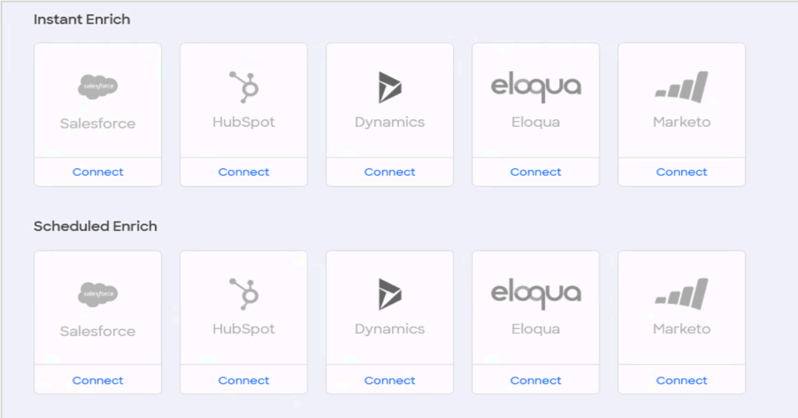
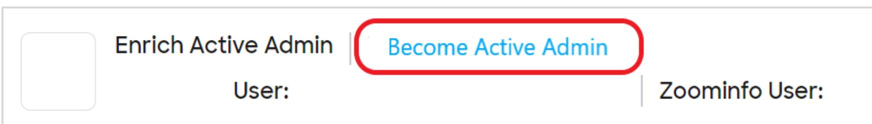
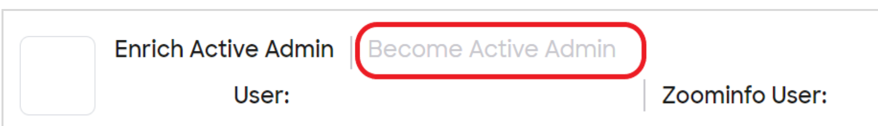


For additional information on how to connect Enrich for HubSpot see the [ZoomInfo Integrations Resource Matrix].

5. At the top of the page you will see **Enrich Active Admin**. If you are not the current Active Admin for Enrich the link will be blue. Click **Become Active Admin** and follow the prompts to become the Active Admin.



If **Become Active Admin** is gray it indicates that you are the current Enrich admin. Hover your mouse over **Become Active Admin** to confirm.



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7. ZoomInfo User shows the ZoomInfo administrator logged into the ZoomInfo platform through the Admin Portal.

Disconnect ZoomInfo From HubSpot

If you want to disconnect ZoomInfo Enrich from HubSpot, disable any Enrich jobs using the **Status** toggle and then click **Disconnect** in the top right of the page.

Enrich Dashboard

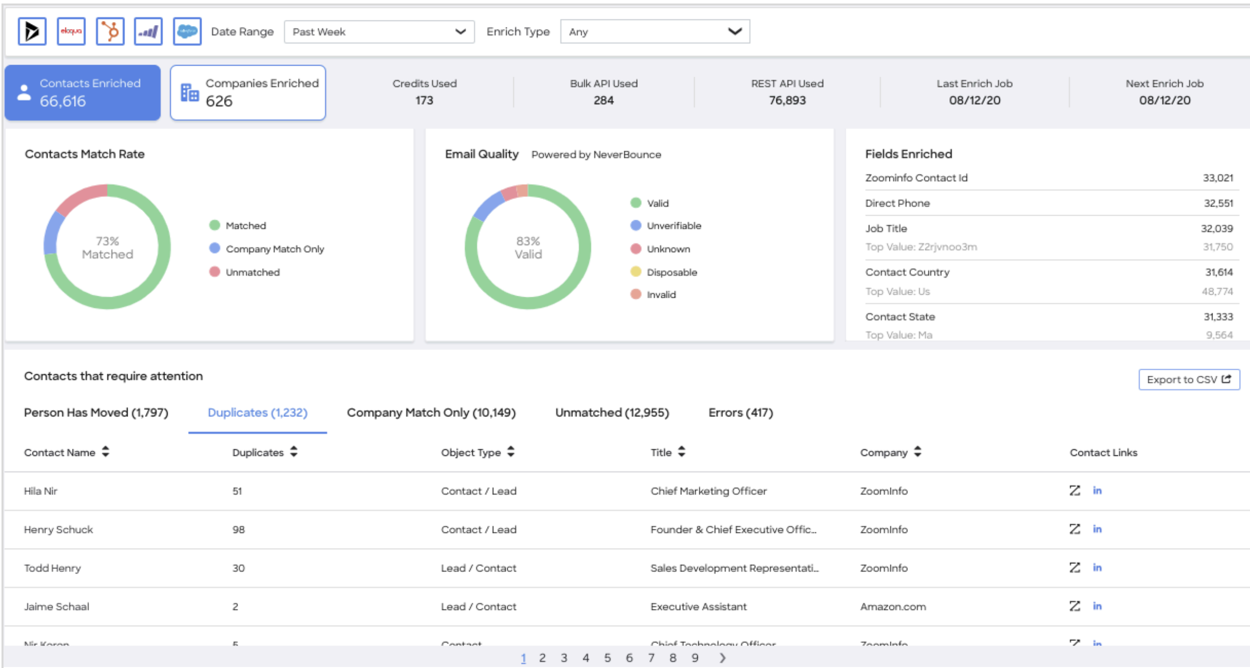
As a ZoomInfo admin, the Enrich dashboard gives you a detailed graphical view of how Scheduled Enrich has impacted the quality and depth of data for your connected CRM and marketing automation integrations.

Access the Enrich Dashboard

1. Go to **Admin Portal > Usage > Enrich Dashboard**.

   The default view for dashboard data is **Any** (includes Scheduled and Instant Enrich.)

2. Use the **Enrich Type** dropdown to view Scheduled Enrich or Instant Enrich data.

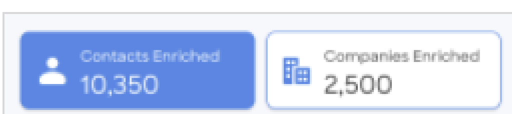


Using the Dashboard

This section describes the dashboard features and actions you can take.

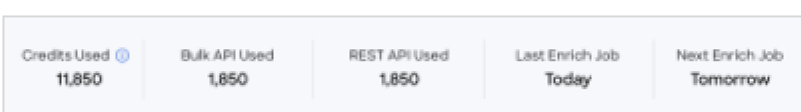
View Contact and Company Enrich Statistics

Contacts Enriched and **Companies Enriched** provides the total number of contacts and companies enriched for the selected integrations.



View Credit and API Usage

The dashboard includes the number of **Credits Used**, **Bulk API Used**, and **REST API Used**. It also shows when the **Last Enrich Job** ran, and when the **Next Enrich Job** is scheduled.

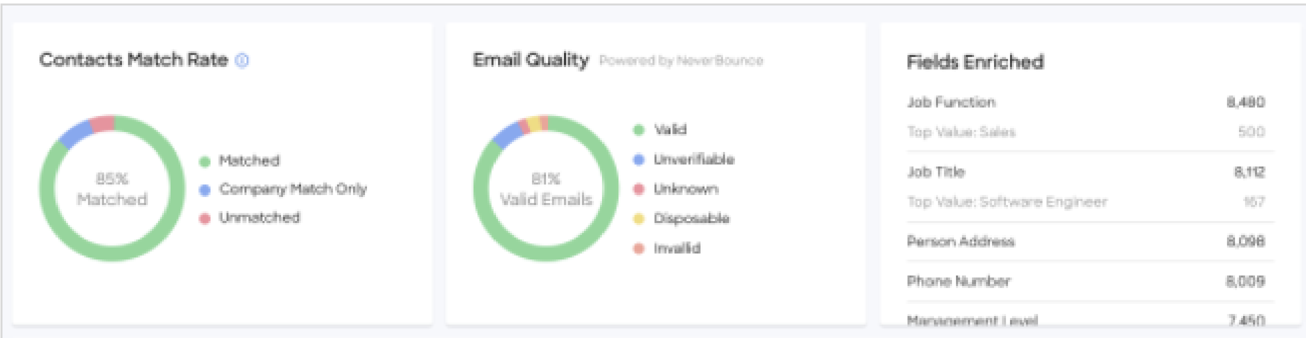


View Match Rate, Email Quality and Fields Enriched

You can view the overall **Contact Match Rate** (broken down by **Matched**, **Company Match Only**, or **Unmatched**).

If you are using NeverBounce, **Email Quality** shows you how NeverBounce has impacted your email delivery success and breaks the data down by NeverBounce status.

Finally, **Fields Enriched** provides a descending list of fields enriched, including the actual value that was most often enriched within some fields.



For **Email Quality**, the values are:

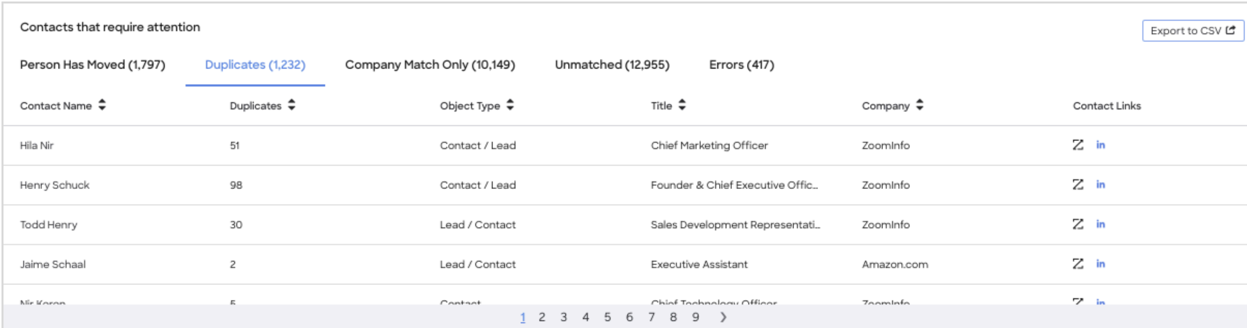
- **Valid**: Email exists and has been verified for safe sending.
- **Invalid**: Email does not exist and is not safe for sending.
- **Unverifiable**: No definitive way to determine whether an email is valid or invalid. If you have a third-party email provider that requires a low bounce rate, it is not safe to send.
- **Disposable**: Email is temporary or fake and is not safe for sending.
- **Unknown**: Unable to determine an email's status. Domain and/or server is not responding to our request. If you have a dedicated email server with your own IPs, it usually is safe for sending. If you use a third-party email provider, it is not safe for sending.

For **Fields Enriched**, the top value indicates the most enriched data point within each field. In the example above, the top value for Job Title is Software Engineer.

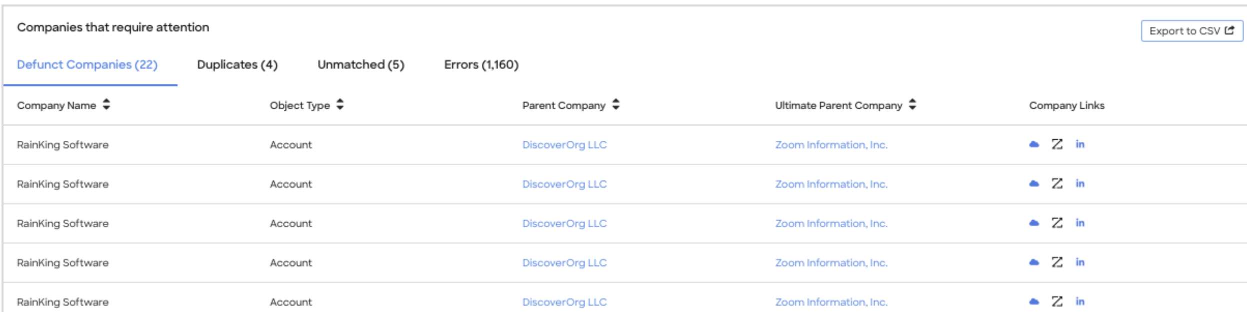
Work with Contacts or Companies Requiring Attention

Click **Contacts Enriched** or **Companies Enriched** to toggle information about contacts or companies that can help you rectify discrepancies.

Contacts that Require Attention



Companies that Require Attention



Discrepancies are categorized to help you manually investigate and resolve issues and export lists.

Contact-related Tabs	Company-related Tabs
Person Has Moved	Defunct Companies
Duplicates	Duplicates
Company Match Only	Unmatched
Unmatched	Errors
Errors	

Click **Export to CSV** to export up to 1,000 records for the current tab.

Considerations and Recommendations

Review the following details.

API Considerations

With Instant Enrich, ZoomInfo will use two (2) API calls per record enriched. The first API call is used to check the field values existing on the record. This check is made to confirm if the field is blank or contains a value (done for the Update Option behavior). The second API call is used to update the contact or company record with ZoomInfo data.

Sync HubSpot and Salesforce

ZoomInfo Contact and Company IDs are unique identifiers which associate a contact or company with a unique record in ZoomInfo's database. This ID is important to track for matching and charging purposes. If you are syncing HubSpot with Salesforce, follow these steps to ensure you are tracking ZoomInfo IDs from your HubSpot environment to Salesforce.

Prerequisite: This procedure assumes you have the latest version of the ZoomInfo Power by DiscoverOrg application for Salesforce installed in your Salesforce environment.

1. Open the **Settings** gear in HubSpot.
2. Under **Integrations**, select **Apps**.
3. Select your Salesforce application.
4. Click **Manage mappings** next to **Contacts sync**.
5. Click **Add new field mapping**.
6. Map the HubSpot property (**ZoomInfo Contact ID**) to Salesforce lead and contact fields (**ZoomInfo ID**).
7. Repeat these steps for **Companies**.